HubSync

CUSTOMER STORY / MID-MARKET

One login, one platform: how MBE CPAs brought big-firm technology to a mid-market practice

MBE consolidated a fragmented technology stack onto HubSync to give clients and staff a single pane of glass, and to build a firm around client experience.

87,000+
DOCUMENTS UPLOADED

17,000
CLIENT COLLABORATION WORKSPACES

1
UNIFIED CLIENT & FIRM EXPERIENCE

THE CHALLENGE: A FRAGMENTED TECHNOLOGY STACK

Like many growing firms, MBE accumulated a different tool for nearly every step of client engagement. Returns went out through SafeSend. Organizers were manually printed from CCH, with some routed electronically and others mailed on paper. The firm had tried more than one last-mile automation product, and none proved efficient or stable.

The result was friction on both sides of the relationship. Clients and staff were logging into system after system, none of which spoke to each other.

> *"The internal pain is, let me log into this software. Now I have to log into this one, and they don't talk to each other."*
>
> CHELSEY LAMKER, ADMINISTRATIVE DIRECTOR

Every workaround added steps, time, and dissatisfaction. The old last-mile tool, for instance, landed at only a 50 to 60 percent success rate.

WHY HUBSYNC: THE VISION WAS ALREADY THERE

MBE was not shopping for individual features. The firm had already sketched out the future it wanted, a single pane of glass where clients and staff could do everything, and had even considered building it in-house before deciding against it. About six months later, they came across HubSync.

The draw was consolidation. "It's really important to us that our clients and our team don't have to log into many different systems," Lamker said. "They log in and it's a one-stop shop. They can access everything they need in one platform."

MBE'S STACK, BEFORE AND AFTER

BEFORE	WITH HUBSYNC
× SafeSend for return delivery	✓ Portal, organizers, delivery
× Paper organizers from CCH	✓ e-Sign and e-File built in
× Last-mile tools at 50–60%	✓ Reliable last-mile automation
× A login for every system	✓ One login for clients and staff

MBE CPAs at a glance

FIRM
Mid-market accounting firm headquartered in Baraboo, Wisconsin

TEAM
Roughly 230 people across offices in Wisconsin, Arizona, Colorado, and Nebraska, plus international teams

ON HUBSYNC
Client portal, organizers, tax return delivery, e-signature, last-mile automation, and e-file, consolidated onto one platform

REPLACED
A patchwork of point tools including SafeSend and multiple last-mile products

> We had talked about putting together something like this ourselves, and we decided we weren't going to. Then about six months later we came across HubSync. We were philosophically aligned before we ever started demoing, so it didn't take much of a sales pitch. In our minds, the vision matched."
>
> **TIM MOY, CPA, CGMA**
> MANAGING PARTNER, MBE CPAS

RESULTS SO FAR

HubSync

01 Consolidation

The client portal, tax return delivery, last-mile automation, e-file, e-signature, and organizers now live on one platform instead of across several disconnected tools.

02 A signing experience clients love

Recent knowledge-based authentication signing improvements have been, in Lamker's words, a game changer for clients.

03 A better last mile

Where the firm's previous last-mile tool succeeded only 50 to 60 percent of the time, HubSync has performed substantially better, moving hours the team used to spend cross-comparing what did and did not go through to more strategic tasks.

04 Efficiency that compounds

MBE is honest that the first season carried the cost of moving clients onto the platform. With that transition work now behind them, the firm expects the efficiency gains to show up more clearly in the seasons ahead.

GOING ALL IN, AT MID-MARKET SIZE

MBE sits in a spot that often gets overlooked. The largest firms carry their own bureaucracy, and many smaller firms assume this level of technology is too big or too expensive for them. MBE rejected that framing and committed fully.

> *"When you make the commitment to change software, you want to make it work to the fullest extent it can. We're always asking, what's the next thing, how do we make this better, how do we use it to its fullest potential."*
>
> CHELSEY LAMKER, ADMINISTRATIVE DIRECTOR

That decisiveness shaped the rollout. Rather than stall in analysis, the firm moved one capability at a time while keeping momentum, standing up last-mile delivery and turning on auto-classification as new tools became available. Decisions that needed more voices went to a team meeting and came back resolved, not stuck.

A PARTNERSHIP, NOT A VENDOR RELATIONSHIP

MBE is candid that any conversion comes with a learning curve, and theirs was no exception. What stood out was how HubSync responded when things did not go perfectly.

> *"We believe in the jockey, which is the team at HubSync. They're listening to us, and they're evolving. When something didn't work out exactly as discussed early on, HubSync respected the relationship enough to double down and make it right."*
>
> TIM MOY, CPA, CGMA, MANAGING PARTNER

Day to day, that partnership shows up as responsiveness. "Having a cheerleader on the team, keeping us moving and progressing, has been important," Lamker said. "Things don't go into a deep, dark black hole. You've been a great team to work with."

THE VISION: CLIENT EXPERIENCE AS A COMPETITIVE ADVANTAGE

For Tim Moy, the platform is a means to a larger end: a single pane of glass for everything coming to and from the client. Firms once received work through a few channels, and a receptionist caught it all and shielded the technical staff from constant interruptions. Email, texting, and cell phones erased that buffer and fragmented the professional's day. MBE wants HubSync to rebuild that buffer, so that every client touchpoint either happens in the platform or is routed into it right away, with client service representatives making sure nothing slips through.

> "If our clients are raging happy about us, that's intangible value on our balance sheet. If you have happy clients, happy employees, and happy shareholders, you've got a great firm."
>
> TIM MOY, CPA, CGMA

Asked what she would tell another mid-market firm weighing the move, Lamker kept it simple. The single pane of glass is the headline, and the partnership is what makes it real. **"Whatever's next on our list, we work as a team to get there."**

See what a single pane of glass could look like at your firm.

See HubSync in Action

hubsync.com